



Is Good Advice Enough to **Retain a Client?**

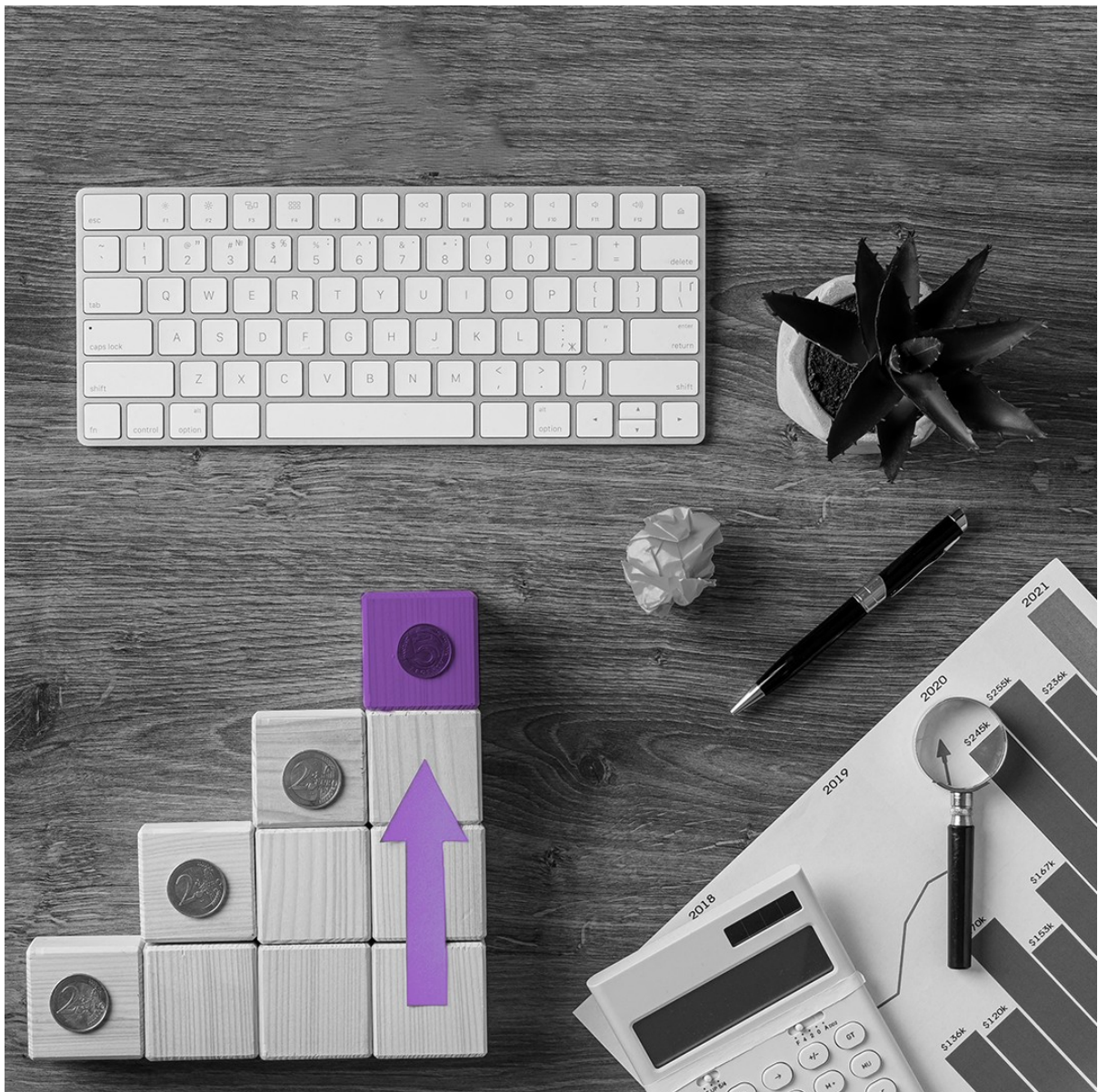
Is Good Advice Enough to Retain a Client?

Wealth managers are increasingly tasked with delivering holistic solutions that combine meaningful advice and bespoke service, rather than focussing only on advice.

Investors seek to be informed and empowered to make their own decisions, rather than solely relying on their advisor. They also expect

more from their advisors than what can be accomplished through digitization alone.

As client expectations, **wealth management technologies** and market conditions evolve, how should **client engagement team advice** in a highly dynamic and competitive market?

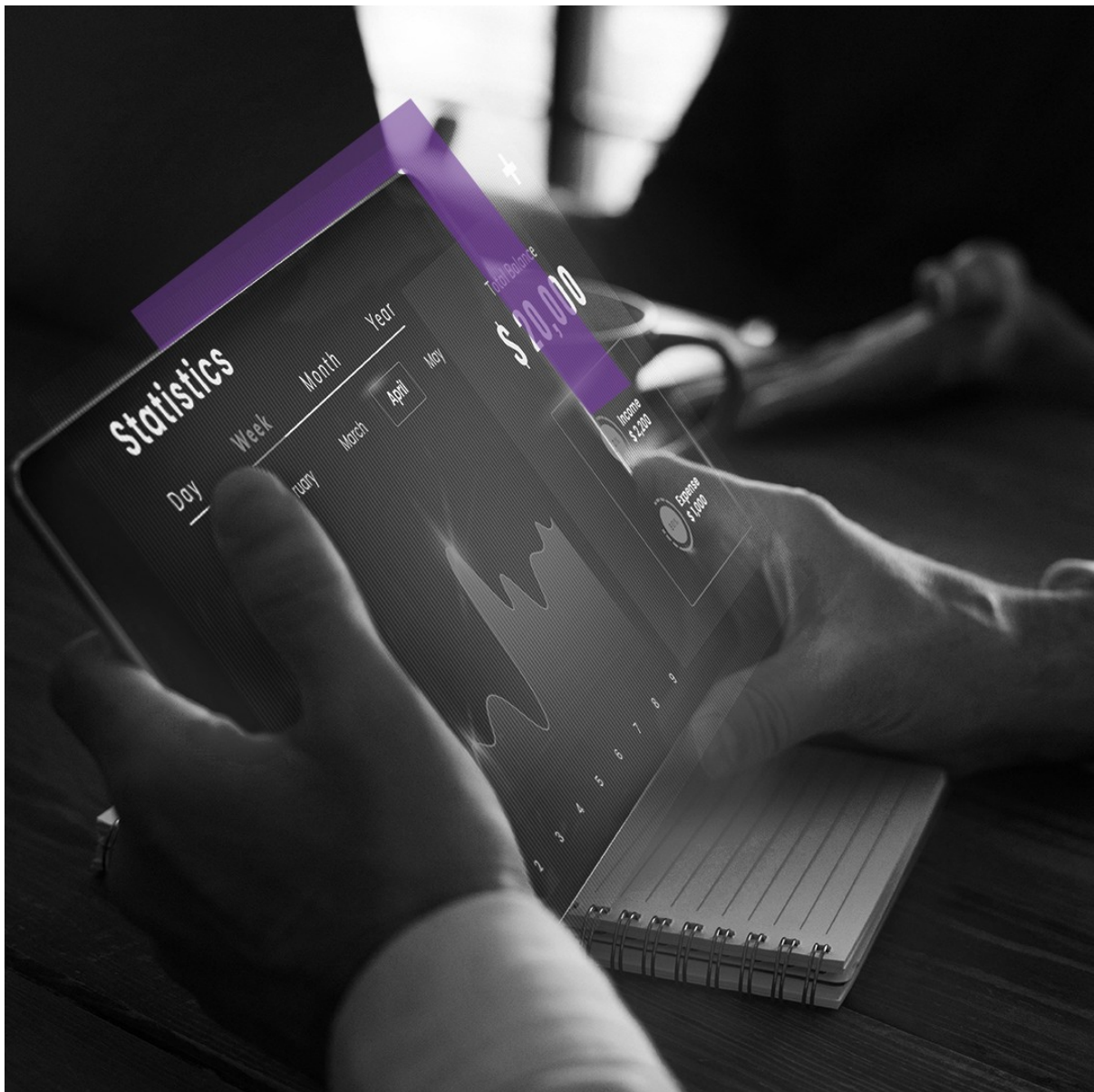


Achieving Client Goals

The aspiration for **all best wealth managers** should be to help investors manage their wealth in order to achieve their goals in every area of their life, both now and in the future.

This requires an integrated approach powered by technology to strengthen client relationships, manage data to deliver actionable insights and sage advice, and deliver enhanced client service.

However, providing customised and comprehensive advice blended with first-class service can be challenging, especially as markets, technologies, and client expectations evolve rapidly.



Wealth Management Technology Responses

Client engagement team needs to deploy a hybrid of in-person and digital engagement to foster trusted client relationships and deliver solutions that meet their unique needs, concerns and challenges.

A crucial part of this approach is selecting, implementing and managing digital technology. The advisor's technology infrastructure must be

deployed and integrated at every stage of the client lifecycle across onboarding, account management, analysis, trade and investment mandates, and reporting.

By leveraging effective data management and richer analytics, advisors can uncover actionable insights, act in a more responsive and agile way, and empower clients to make decisions and provide personalised, high-touch service.

Cover All the Bases

The integrated platform should provide consolidated multi-asset, multi-currency and multi-custodial capabilities.

This will enable **client engagement team** to deliver a nimble and broadly diversified portfolio with a multi-asset strategy that combines different types of assets, including equity, fixed income, currency, commodity and alternative investments.

It also ensures efficient portfolio construction and management, including proposal generation, modelling, tax rebalancing, reporting and billing, across assets at multiple custodial firms. A robust multi-custodian platform also helps reduce data inconsistencies, regardless of where accounts are held.

In an increasingly interconnected world, the integrated solution should deliver multi-currency portfolio management, tracking and reporting for GIPS composites, bonds, options and futures.

Backed by advanced **wealth management technology**, an integrated solution can help advisors enhance client service, operational efficiency and competitive advantage in a meaningful, sustainable and valuable way.

Driving Holistic Solutions

By combining technology, data and service, wealth managers can improve client experience, strengthen client trust, and increase efficiency and transparency throughout the entire client lifecycle. This can help unlock the promise of holistic client engagement that blends expert advice with outstanding service to empower clients to achieve their goals.

Valuefy is a premier investment technology lab with cutting-edge solutions serving leading financial institutions across the globe. Its Wealth Management Solutions has enabled Wealth Managers globally by providing production-grade investment technology solutions for an uberized customer experience.